



Duncan MacPherson

Top Presentations

As a speaker in high demand, Duncan travels extensively throughout North America and around the world, conveying dynamic and fact-rich presentations that have made him a popular spokesperson for the Financial Services industry.

Duncan's expertise in demystifying business development and marketing in the financial world has universal appeal; from the high-level advisor to the successful wholesaler, to corporate financial institutions. Duncan's primary goal is to help Professionals achieve liberation and order in their businesses through step-by-step methodology and execution.

Duncan is also an industry best-selling author and has written many books including: The Advisor Playbook and The Blue Square Method; The mindset and best-practices of top fee-for-service professionals.

THE STRATEGIC GROWTH BLUEPRINT



REIMAGINE, REFRAME and REIGNITE your business!

Duncan MacPherson's presentation captures the mindset and best practices of top financial professionals, drawing on years of experience with the most effective teams in the financial services sector. Designed for teams striving to elevate their performance, this presentation provides actionable strategies to:

- **Achieve Professional Contrast: Stand out in a crowded marketplace by enhancing your unique value proposition.**
- **Streamline Client Experience: Add efficiency and consistency to ensure every client interaction reinforces your brand.**
- **Foster Organic Growth: Unlock referrals by delivering a remarkable experience that turns clients into advocates.**

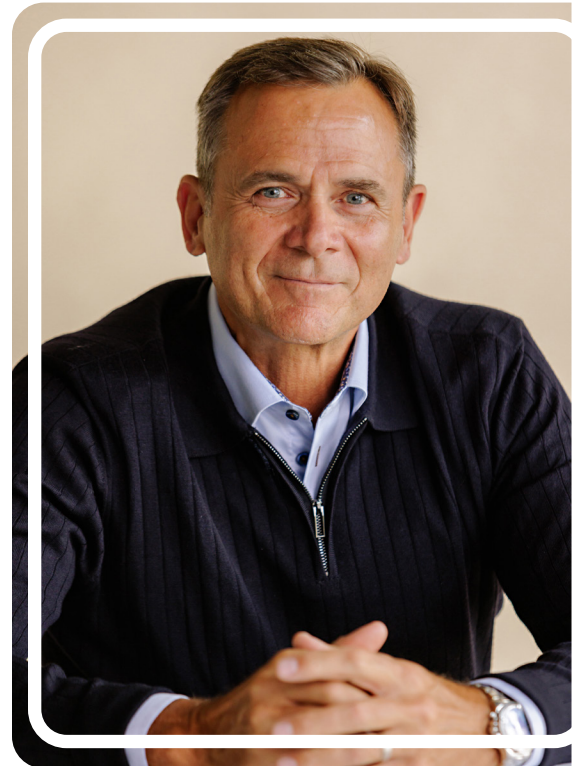
Top teams don't rest on their foundation—they build on it. By implementing these proven strategies, you'll avoid plateaus, maximize fee worthiness, and reach new levels of sustainable growth.



THE MULTIPLIER METHOD

TRANSFORM your growth strategy!

Join Duncan MacPherson, as he delves into the critical transition from organic to scalable growth. This pivotal shift is essential for any business looking to expand its reach and impact significantly. Duncan will explore actionable strategies, pulled from "The Blue Square Method", to build and enhance your team, acquire complementary businesses, and leverage your intellectual property for exponential growth.



Key Takeaways:

- Understanding the shift from B2C to B2B models.
- Leveraging your intellectual property for exponential growth.
- Building and enhancing your team to support scalable growth.
- Acquiring complementary businesses to expand your market presence.
- Practical steps to implement a scalable growth strategy in your business.

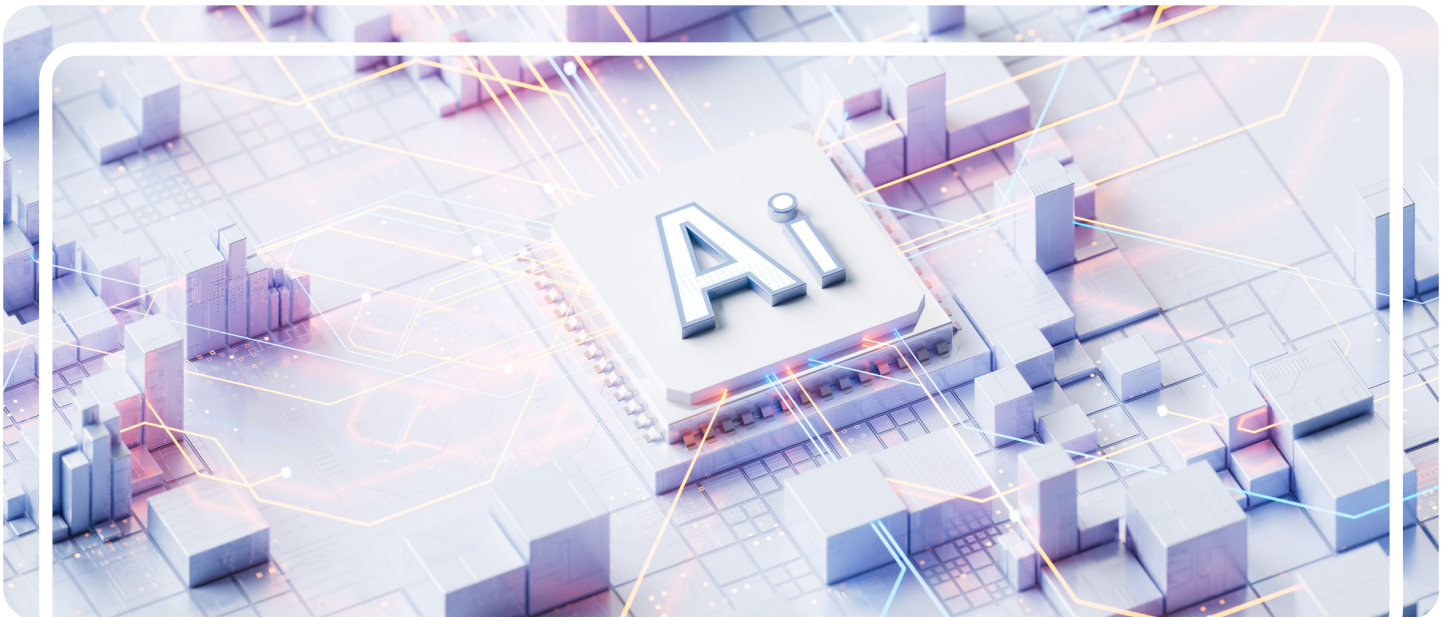
CREATING EFFICIENCIES AND ELEVATING THE CLIENT EXPERIENCE

HARNESSING AI FOR GROWTH

In this fast-paced presentation, Duncan MacPherson explores how financial advisors can leverage the transformative power of AI to elevate their practice. By integrating principles from The Advisor Playbook and The Blue Square Method, advisors can harness AI to:

- **Streamline Practice Management:** Use AI tools to automate repetitive tasks and create more time for meaningful client engagement.
- **Enhance Content Creation:** Leverage AI to generate impactful communication tailored to your clients' needs.
- **Scale Personalized Service:** Combine AI-driven insights with the human touch to create a client experience that fosters loyalty and advocacy.

AI should support—not replace—the human element. Learn how to thoughtfully deploy AI to enhance communication, deepen relationships, and position your practice for sustainable growth.



THE REAL VALUE BEGINS ONCE THE PRESENTATION ENDS



Whether in person or virtual, Duncan's presentations go beyond inspiration. They deliver actionable strategies with a clear path for implementation, ensuring financial professionals can achieve real results.

Each presentation is paired with follow-up resources designed to embed the insights into daily business practices.

Speak to your First Trust Wholesaler to book Duncan for an upcoming event.

All of Duncan's presentations are available in Key-Note, Breakout and Workshop formats.